

Evidence Summarization Survey

Information Sheet

SURVEY INFORMATION

What is the study about?

We want to generate consensus on an approach for selecting and summarizing the evidence included in patient decision aids. Our workgroup developed a proposed set of Phases, Steps and Criteria, based on the methods used to develop trustworthy clinical practice guidelines. The purpose of this survey is to gain your perspective, as an expert, patient or other stakeholder.

What is involved?

If you participate, we'll ask you to complete two or three surveys. In the first survey, we'll ask for your perspective on the proposed Phases, Steps and Criteria. This will include rating importance, suggesting wording changes and suggesting additional items. In the second and third surveys, we'll ask similar questions except we'll also share some results from the first survey.

How long will it take?

Completing this survey should take less than 25 minutes.

Do I have to take part?

No. Taking part is voluntary.

Will I be compensated?

You won't be compensated. However, we hope you'll take part. Your contributions

will improve the process of developing reliable, high-quality decision aids for patients.

Are there any risks?

We don't anticipate any risks from participating in the study.

How will my privacy be protected?

We won't name any individuals in any publications or presentations.

How can I contact you?

If you have questions, please feel free to contact Michelle Dannenberg (Michelle.D.Dannenberg@dartmouth.edu), Research Coordinator, The Dartmouth Institute for Health Policy and Clinical Practice, Dartmouth College.

If you would like to speak to the researchers leading this study, please contact Prof. Marie-Anne Durand (Marie-Anne.Durand@dartmouth.edu) or Prof. Glyn Elwyn (glynelwyn@gmail.com), The Dartmouth Institute for Health Policy and Clinical Practice, Dartmouth College.

What happens if I do not respond?

You'll receive two automated email reminders to complete the survey.

Do you want to participate?

- Yes
- No

Background Questions

BACKGROUND QUESTIONS

Which of the following best describes you? Please select all that apply.

- Patient Decision Aid (PDA) developer
- Researcher
- International Patient Decision Aids Standards (IPDAS) collaboration member
- Policy maker
- Patient
- Clinician, please specify specialty:
- Other, please specify:

Which country do you live in?

What is your gender?

- Male
- Female
- Other

What is your race/ethnicity? Please select all that apply.

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- Hispanic, Latino/a or Spanish Origin
- White

Other, please specify:

BACKGROUND QUESTIONS

We're requesting your email address so we can contact you for the next phase of this project. We will not share your email with anyone outside the study team, and we will not contact you about anything other than the study.

Please provide your email:

Overall Proposed Phases, Steps and Criteria

INFORMATION ON PROPOSED PROCESS

Decision aids are tools that help patients make choices. They provide information about the risks and benefits of health treatments and tests.

Accurate and clear information is critical. It's important for decision aids to have accurate and trustworthy information from research evidence about the risks and benefits of health treatments and tests.

We're trying to make evidence summarization easier. We're doing this by developing a process to guide decision aid developers in evidence summarization.

We're building on the good work that's already been done. This process includes the existing work of the International Patient Decision Aid Standards (IPDAS) collaboration.

We sketched out a proposed process, see Figure below. We are interested in your feedback on ALL elements of this, including the Phases, Steps and Criteria, as

well as the order and grouping.

Here's how you can help. In the questions that follow, we will ask for your perspective on **how important each criterion is to include in the proposed process**. We will also ask for feedback on the wording of all parts. Nothing is final. Everything is up for discussion, and we are looking forward to hearing from you.

Below is a visual representation of the proposed process. Review it carefully. There are four proposed phases, each with one to five proposed steps. Each step has a number of proposed Criteria. In the visual representation below, we show the first Criteria for each step. The tabs represent additional Criteria.

Feel free to [click here](#) to view the representation of the proposed Phases, Steps and Criteria in a separate window. You can click on the image to zoom. You can refer back to this image as you answer questions about the proposed process. Don't worry, if you accidentally close the window, there are links to the figure on each page of the survey.

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids

Phase

Step

Criteria

Tabs represent additional criteria

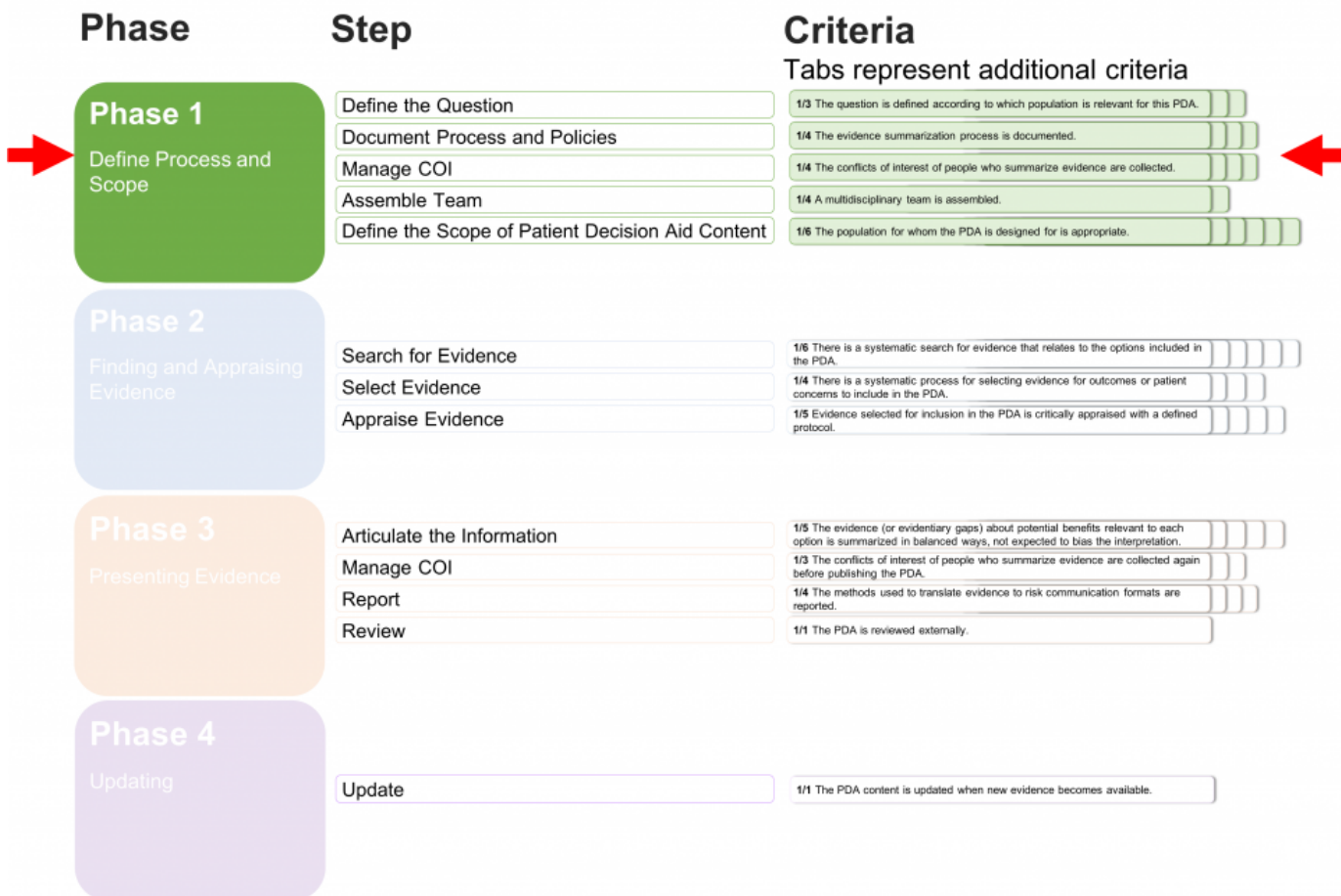
Phase 1 Define Process and Scope	Define the Question	1/3 The question is defined according to which population is relevant for this PDA.
	Document Process and Policies	1/4 The evidence summarization process is documented.
	Manage COI	1/4 The conflicts of interest of people who summarize evidence are collected.
	Assemble Team	1/4 A multidisciplinary team is assembled.
	Define the Scope of Patient Decision Aid Content	1/6 The population for whom the PDA is designed for is appropriate.
Phase 2 Finding and Appraising Evidence	Search for Evidence	1/6 There is a systematic search for evidence that relates to the options included in the PDA.
	Select Evidence	1/4 There is a systematic process for selecting evidence for outcomes or patient concerns to include in the PDA.
	Appraise Evidence	1/5 Evidence selected for inclusion in the PDA is critically appraised with a defined protocol.
Phase 3 Presenting Evidence	Articulate the Information	1/5 The evidence (or evidentiary gaps) about potential benefits relevant to each option is summarized in balanced ways, not expected to bias the interpretation.
	Manage COI	1/3 The conflicts of interest of people who summarize evidence are collected again before publishing the PDA.
	Report	1/4 The methods used to translate evidence to risk communication formats are reported.
	Review	1/1 The PDA is reviewed externally.
Phase 4 Updating	Update	1/1 The PDA content is updated when new evidence becomes available.

Phase 1

PROPOSED PHASE 1

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Phase below? If so, please share them.

- **Phase 1: Defining Process and Scope**

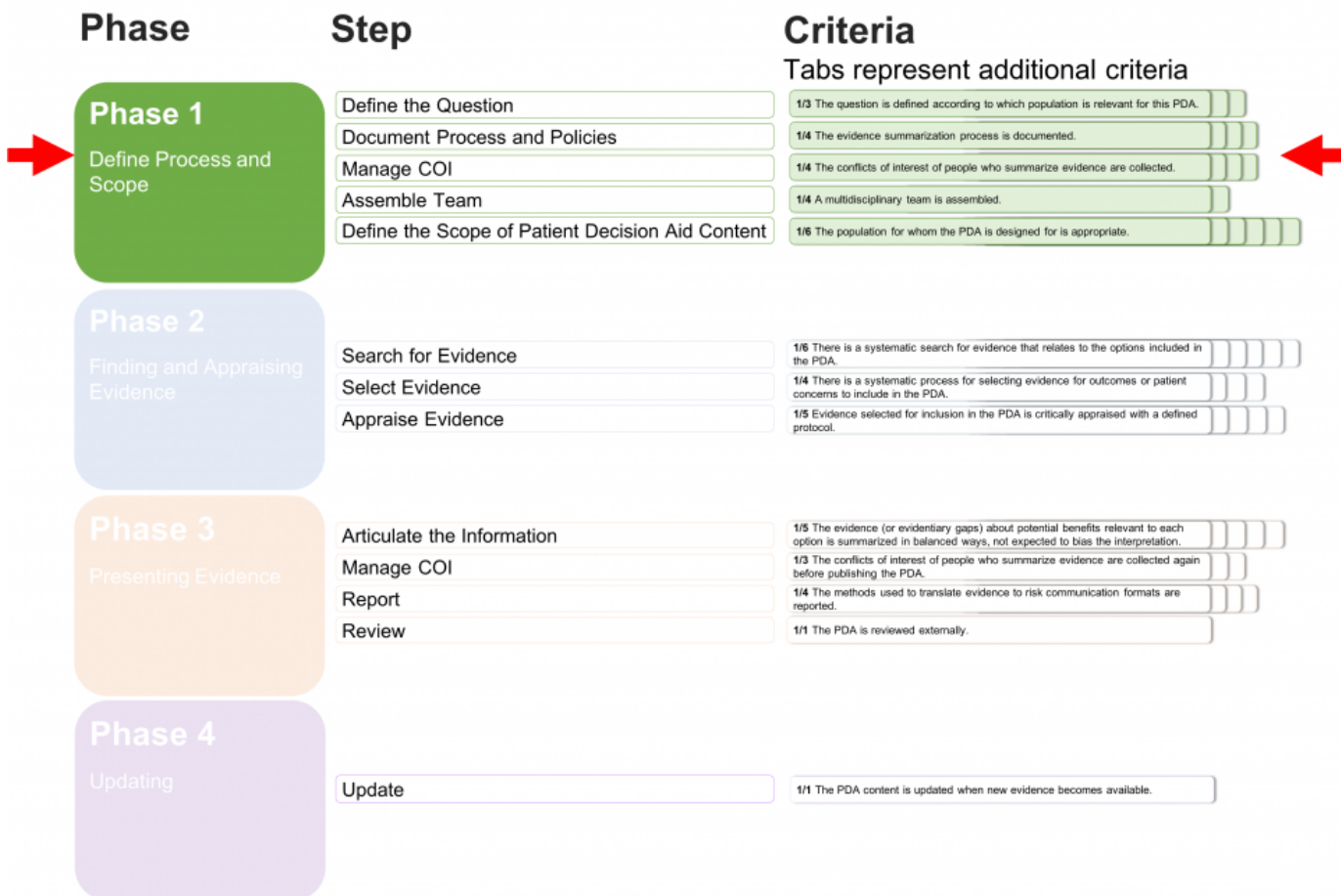
Do you have any comments on the Steps below, including their wording or order? Or suggestions for additional steps? If so, please share them.

- **Step 1: Define the Question**
- **Step 2: Document Process and Policies**
- **Step 3: Manage COI**
- **Step 4: Assemble Team**
- **Step 5: Define the Scope of Patient Decision Aid Content**

PROPOSED PHASE 1 STEP 1

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 1: Define the Question**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Desira
The question is defined according to which population is relevant for this PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The question is defined according to which options are relevant for this PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The question is defined according to which outcomes or patient concerns are relevant for this PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

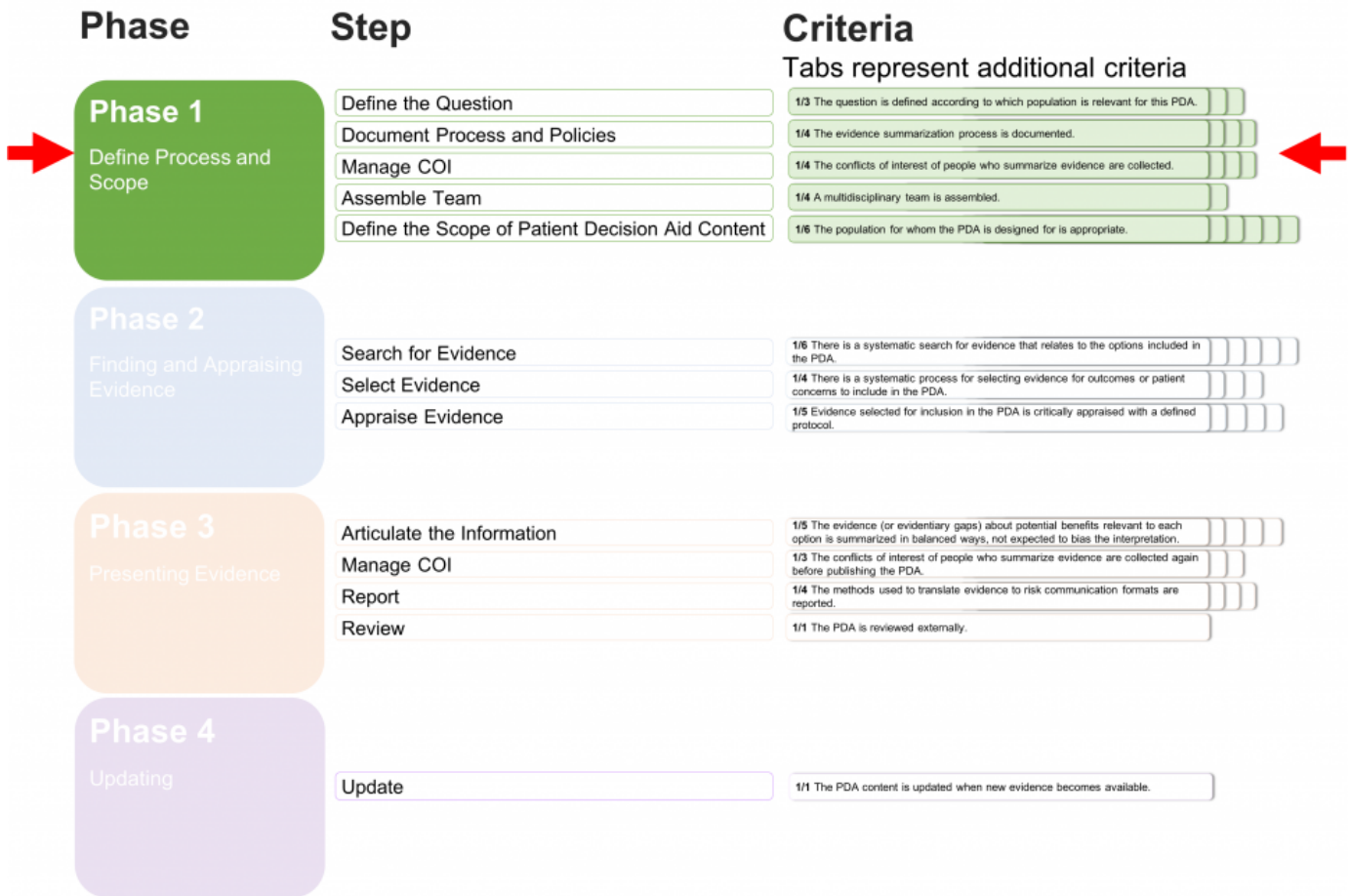
Do you have any comments or suggestions on the Criteria above? If so, please share them.

Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

PROPOSED PHASE 1 STEP 2

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on this Step? If so, please share them.

- **Step 2: Document Process and Policies**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Essential
The evidence summarization process is documented.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The evidence summarization process minimizes bias.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The evidence summarization process minimizes conflicts of interest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The conflict of interest policy applying to people who summarize evidence is documented.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

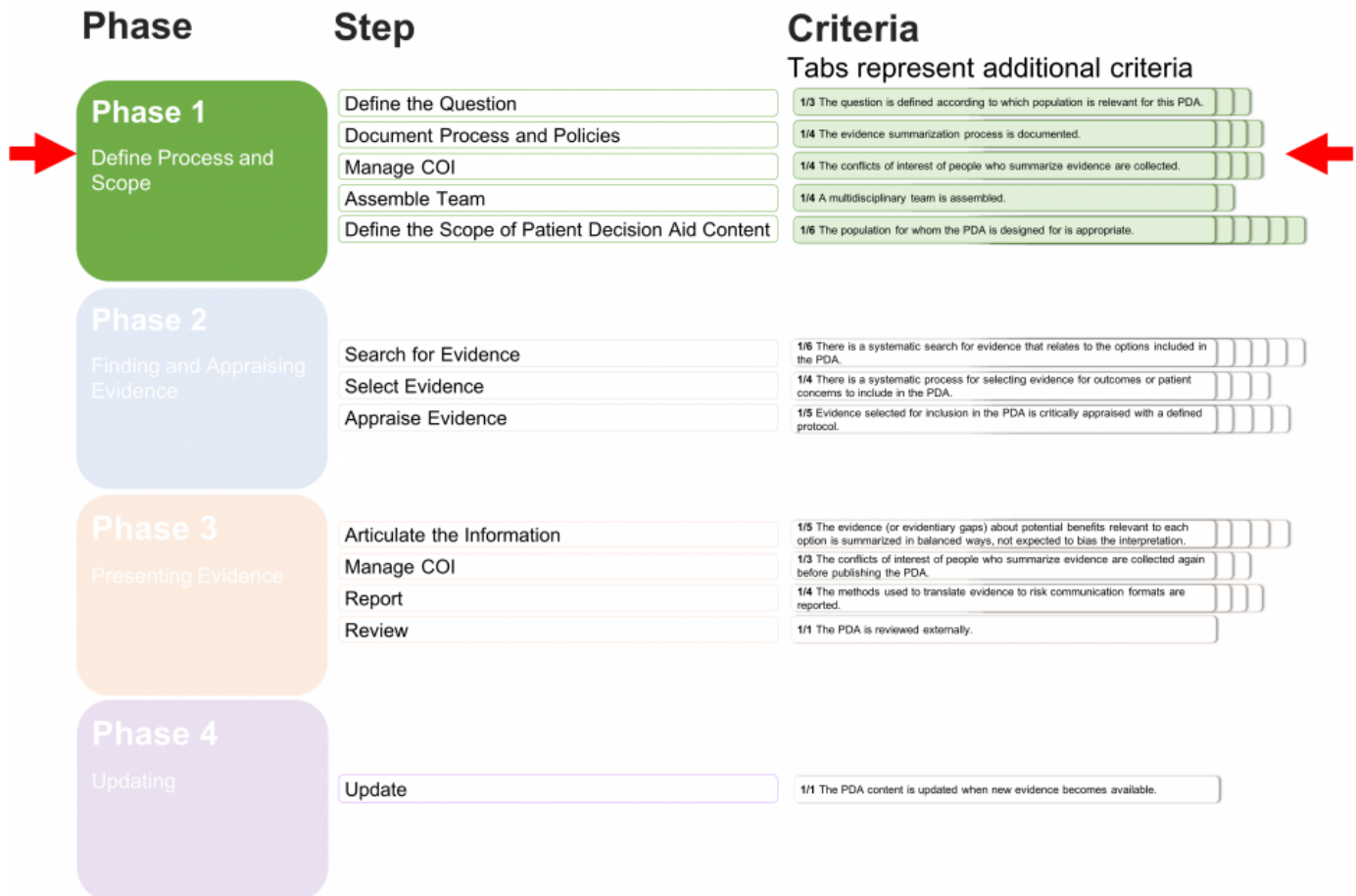
Do you have any comments or suggestions on the Criteria above? If so, please share them.

Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

PROPOSED PHASE 1 STEP 3

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on this Step? If so, please share them.

- **Step 3: Manage COI**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Essential
The conflicts of interest of people who summarize evidence are collected.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Actions are taken to manage relevant conflicts of interest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The actions taken on relevant conflicts of interest are documented.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conflicts of interest are monitored over the course of PDA development.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

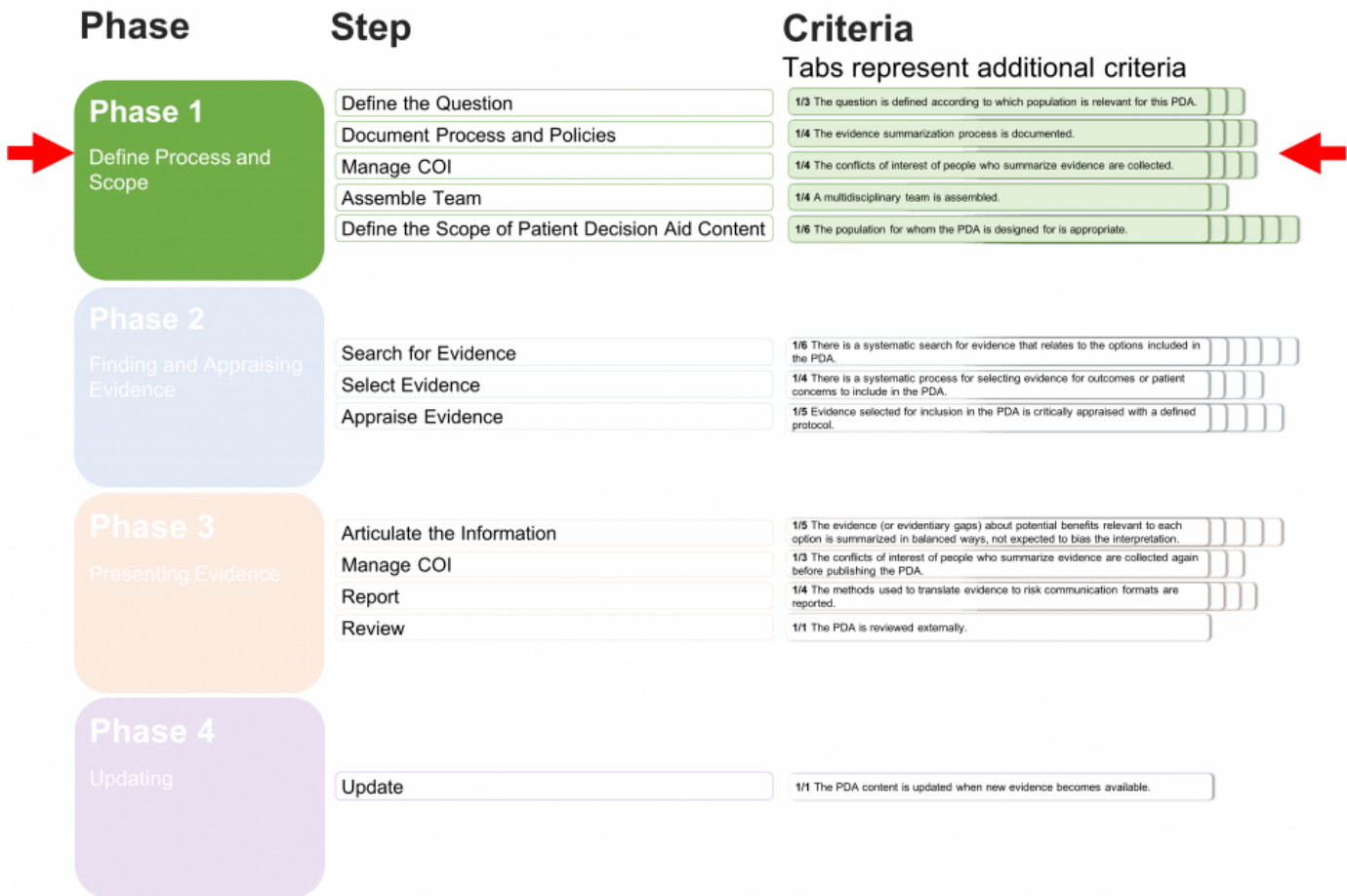
Do you have any comments or suggestions on the Criteria above? If so, please share them.

Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

PROPOSED PHASE 1 STEP 4

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 4: Assemble Team**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Essential
A multidisciplinary team is assembled.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The team comprises clinicians.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The team comprises methodological experts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The team comprises patient or consumer representatives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

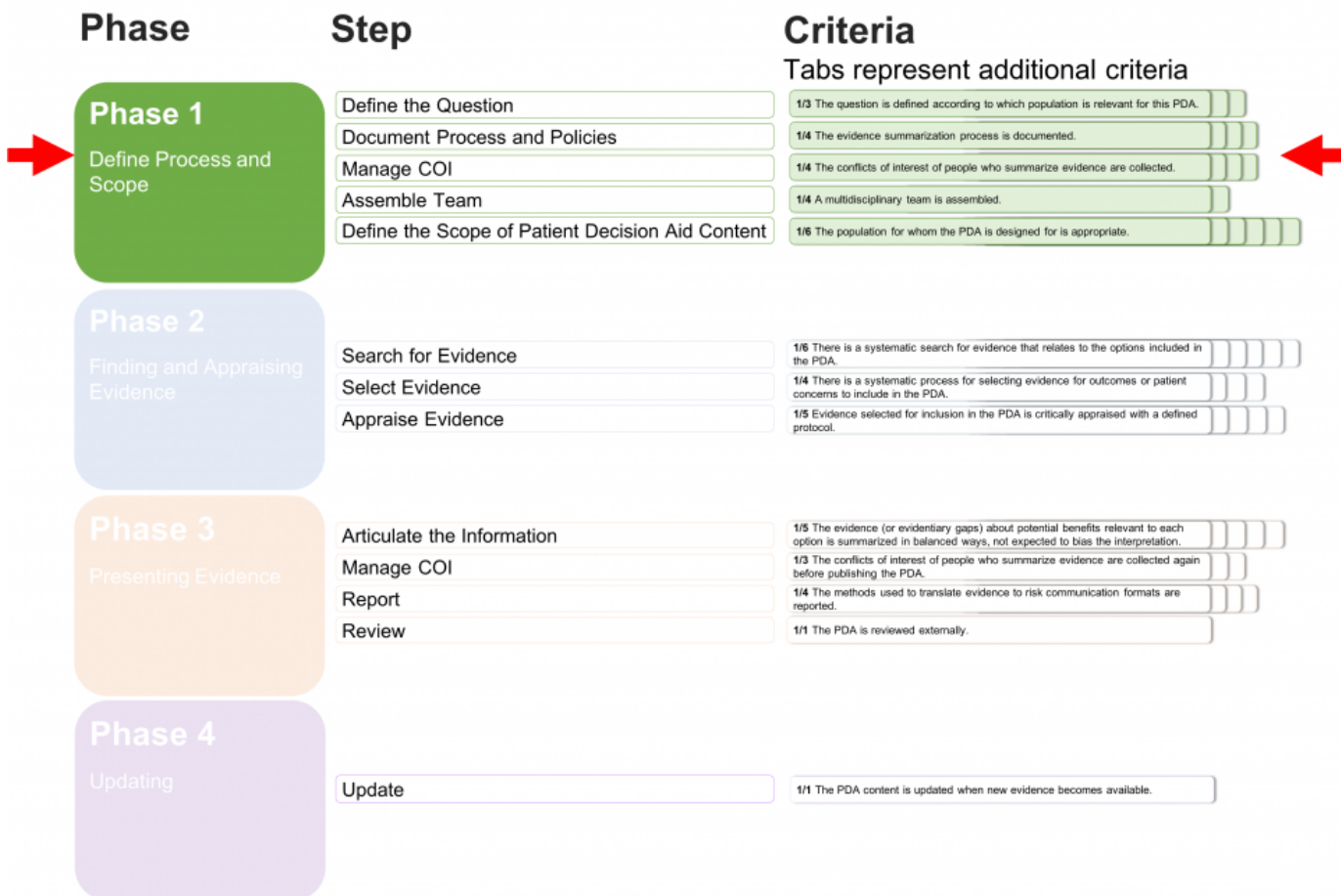
Do you have any comments or suggestions on the Criteria above? If so, please share them.

Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

PROPOSED PHASE 1 STEP 5

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 5: Define the Scope of Patient Decision Aid Content**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Essential
The population for whom the PDA is designed for is appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a systematic process to reduce bias in the definition of the population for the PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The options for inclusion in the PDA are appropriate for the intended population.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a systematic process to reduce bias in the definition of the options for the PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The outcomes or patient concerns for inclusion in the PDA are appropriate for the intended population and options.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a systematic process to reduce bias in the definition of the outcomes or patient concerns for the PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you have any comments or suggestions on the Criteria above? If so, please share them.

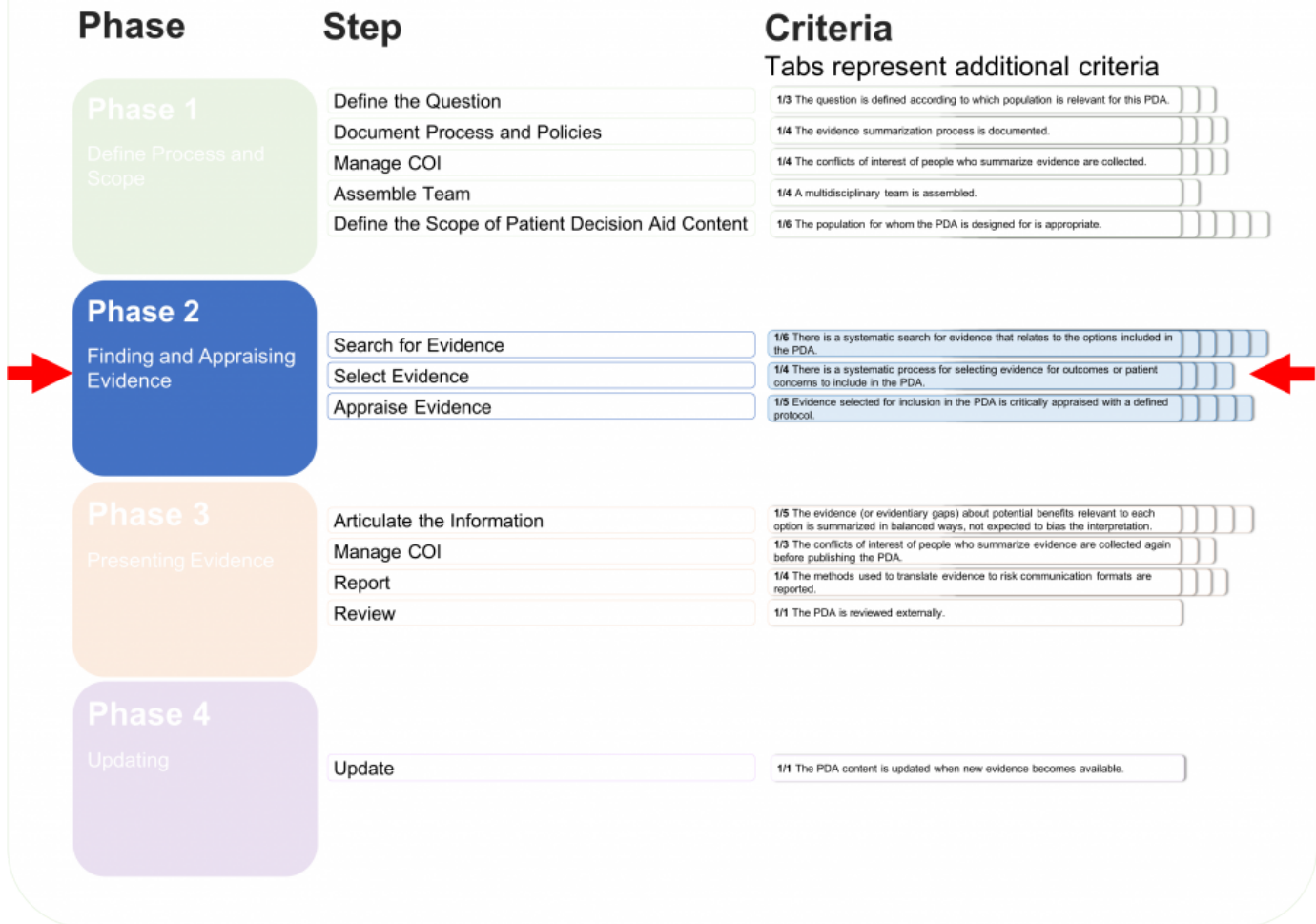
Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

Phase 2

PROPOSED PHASE 2

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

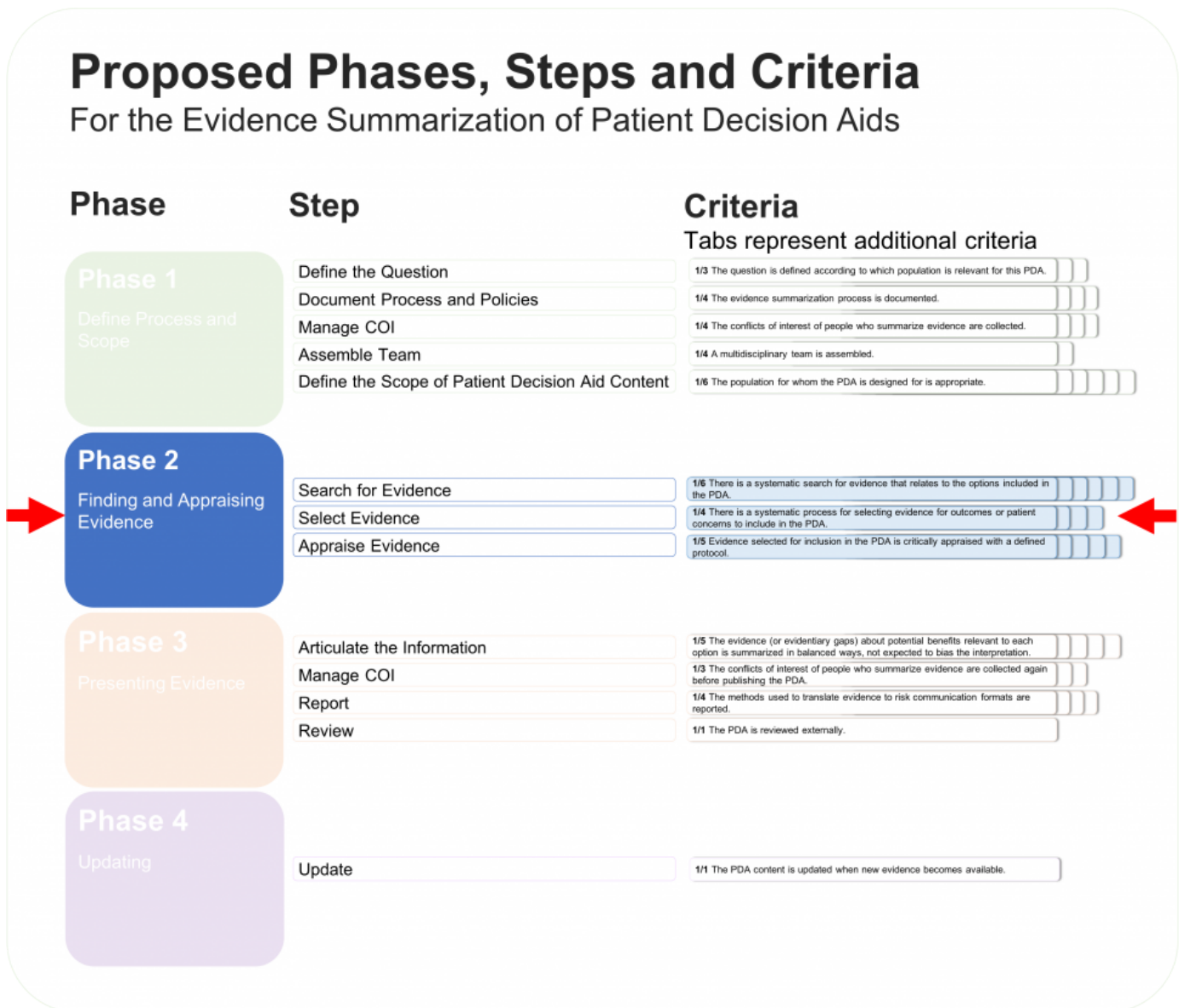
Do you have any comments or suggestions on the Phase below? If so, please share them.

- **Phase 2: Finding & Appraising Evidence**

Do you have any comments on the Steps below, including their wording or order? Or suggestions for additional steps? If so, please share them.

- **Step 1: Search for Evidence**
- **Step 2: Select Evidence**
- **Step 3: Appraise Evidence**

PROPOSED PHASE 2 STEP 1



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on this Step? If so, please share them.

- **Step 1: Search for Evidence**

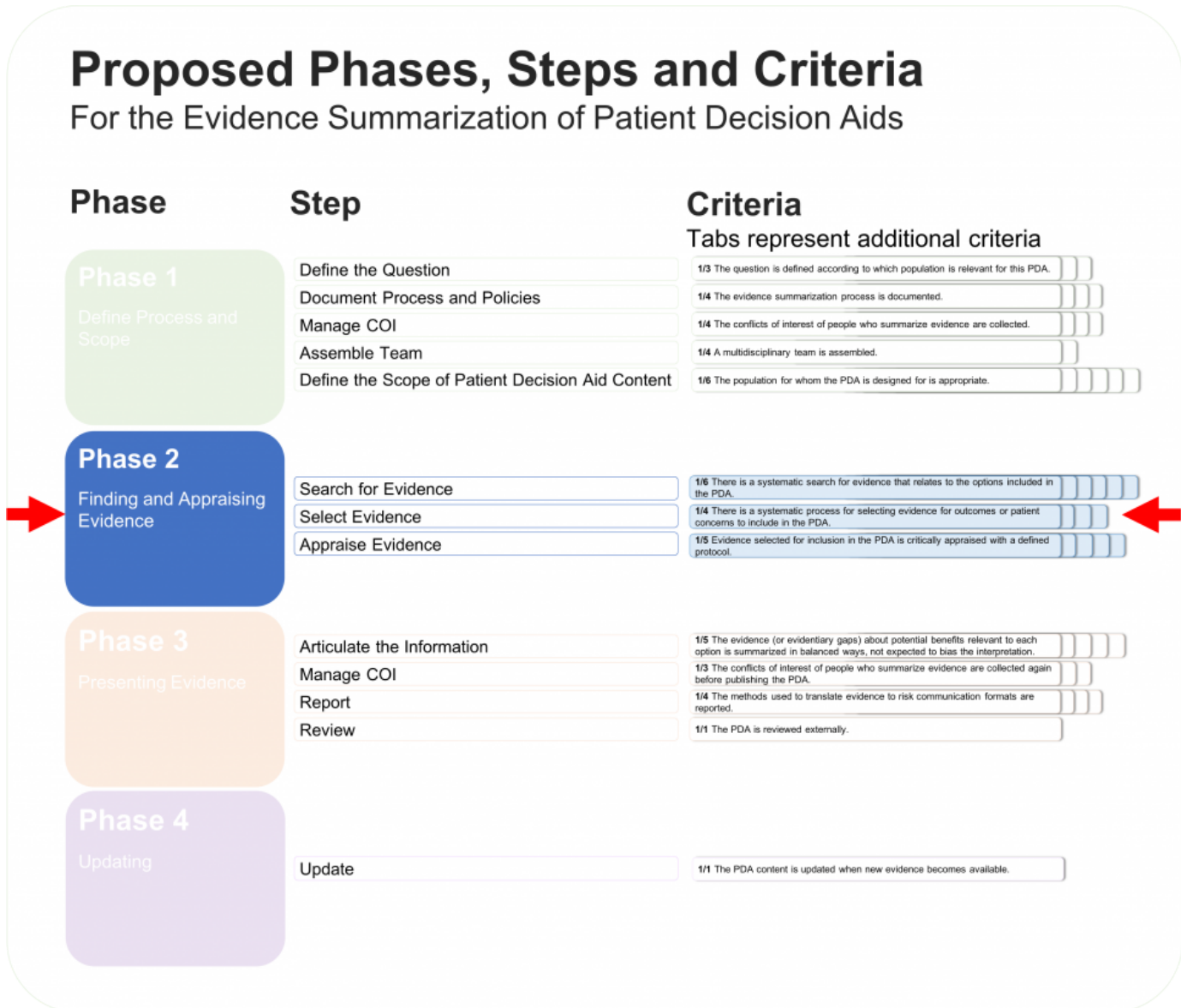
The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Essential
There is a systematic search for evidence that relates to the options included in the PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a systematic search for evidence that relates to the outcomes or patient concerns included in the PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If the PDA is customizable to individual patient factors, there is a systematic search for evidence of how individual patient factors influence the expected outcomes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you have any comments or suggestions on the Criteria above? If so, please share them.

Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

PROPOSED PHASE 2 STEP 2



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 2: Select Evidence**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Essential
There is a systematic process for selecting evidence for outcomes or patient concerns to include in the PDA (where evidence is not available, can directly ask patients).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a systematic process for selecting evidence (or evidentiary gaps) about potential benefits relevant to each option.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a systematic process for selecting evidence (or evidentiary gaps) about potential harms relevant to each option.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If the PDA is customizable to individual patient factors, there is a systematic process for selecting relevant risk predictors to include in the PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

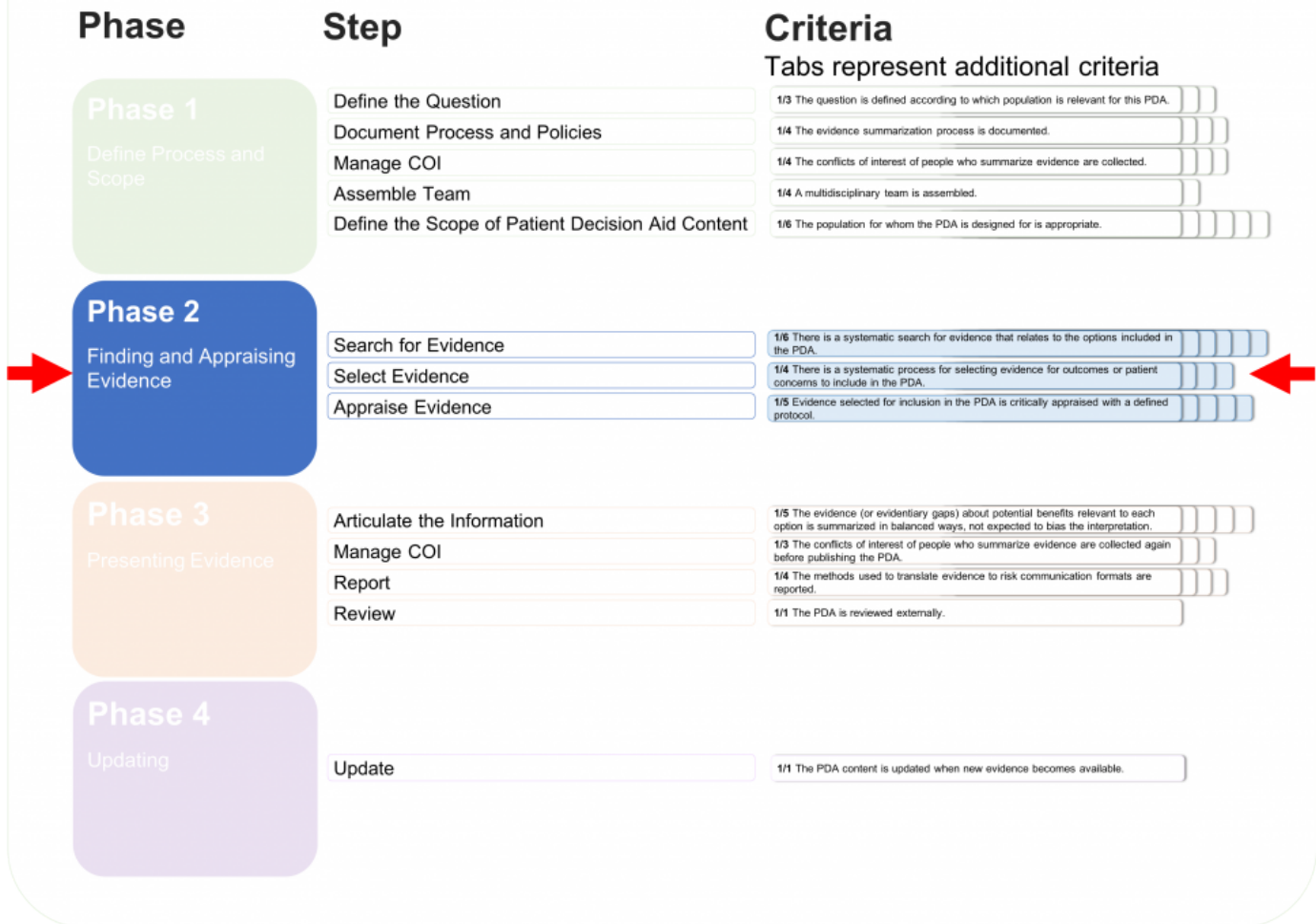
Do you have any comments or suggestions on the Criteria above? If so, please share them.

Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

PROPOSED PHASE 2 STEP 3

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 3: Appraise Evidence**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Essential
Evidence selected for inclusion in the PDA is critically appraised with a defined protocol (such as GRADE).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The protocol for critical appraisal of evidence accounts for risks of bias in study design.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The protocol for critical appraisal of evidence accounts for risks of bias in study analysis and reporting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The protocol for critical appraisal of evidence accounts for assessment of certainty of evidence with attention to risk of bias, precision, directness, consistency, and publication bias.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The conflicts of interest of study authors related to selected evidence is appraised.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you have any comments or suggestions on the Criteria above? If so, please share them.

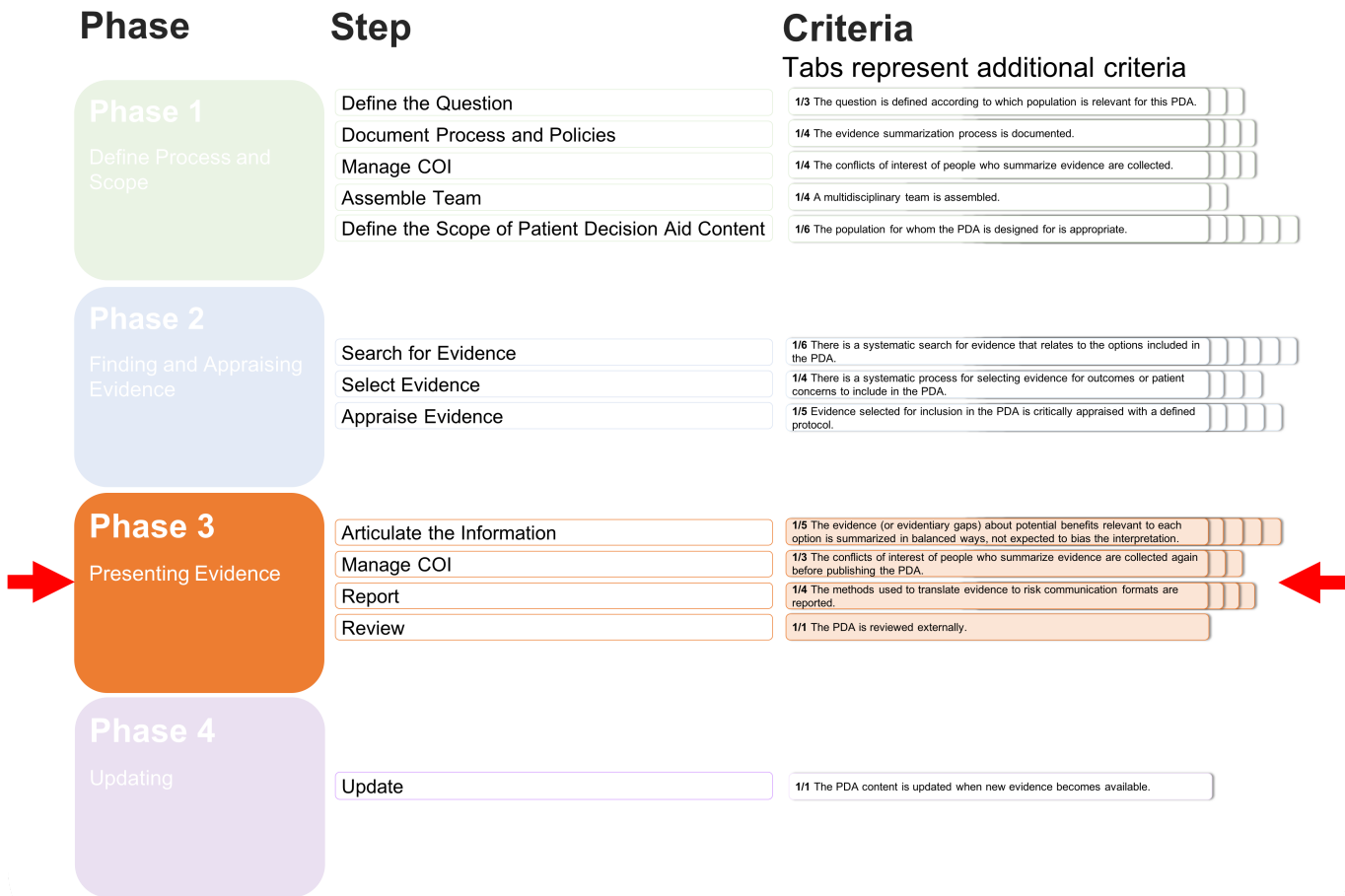
Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

Phase 3

PROPOSED PHASE 3

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Phase below? If so, please share them.

- **Phase 3: Presenting Evidence**

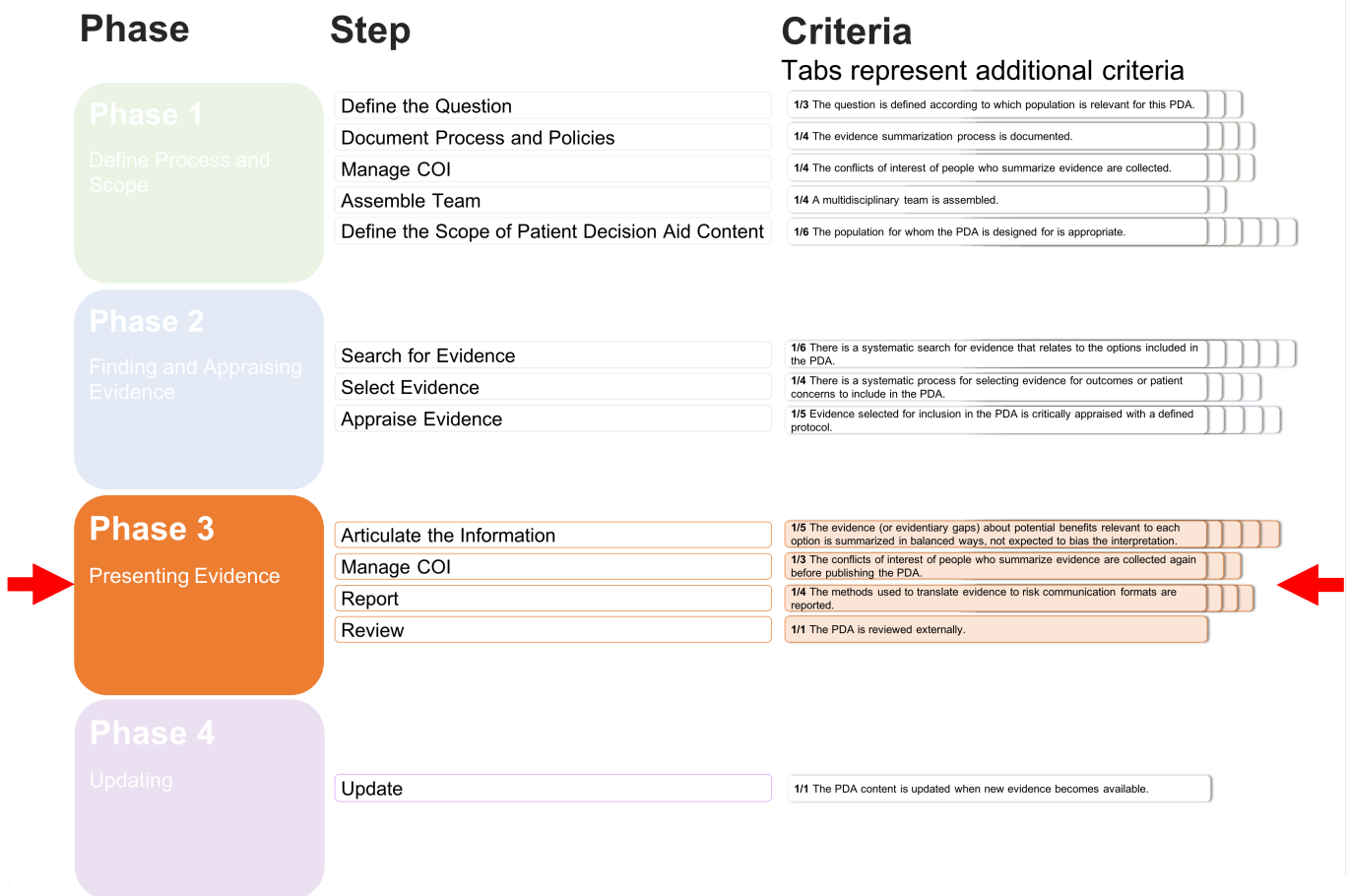
Do you have any comments on the Steps below, including their wording or order? Or do you have suggestions for additional steps? If so, please share them.

- **Step 1: Articulate the Information**
- **Step 2: Manage COI**
- **Step 3: Report**
- **Step 4: Review**

PROPOSED PHASE 3 STEP 1

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 1: Articulate the Information**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible I
The evidence (or evidentiary gaps) about potential benefits relevant to each option is summarized in balanced ways, not expected to bias the interpretation.	<input type="radio"/>	<input type="radio"/>
The evidence (or evidentiary gaps) about potential harms relevant to each option is summarized in balanced ways, not expected to bias the interpretation.	<input type="radio"/>	<input type="radio"/>
The evidence (or evidentiary gaps) is summarized in ways that are easy to understand.	<input type="radio"/>	<input type="radio"/>
The certainty of the evidence is described in ways that are easy to understand.	<input type="radio"/>	<input type="radio"/>
The evidence summarization process is described in ways that are easy to understand.	<input type="radio"/>	<input type="radio"/>
The funding used to summarize the evidence (and develop the PDA) is reported.	<input type="radio"/>	<input type="radio"/>

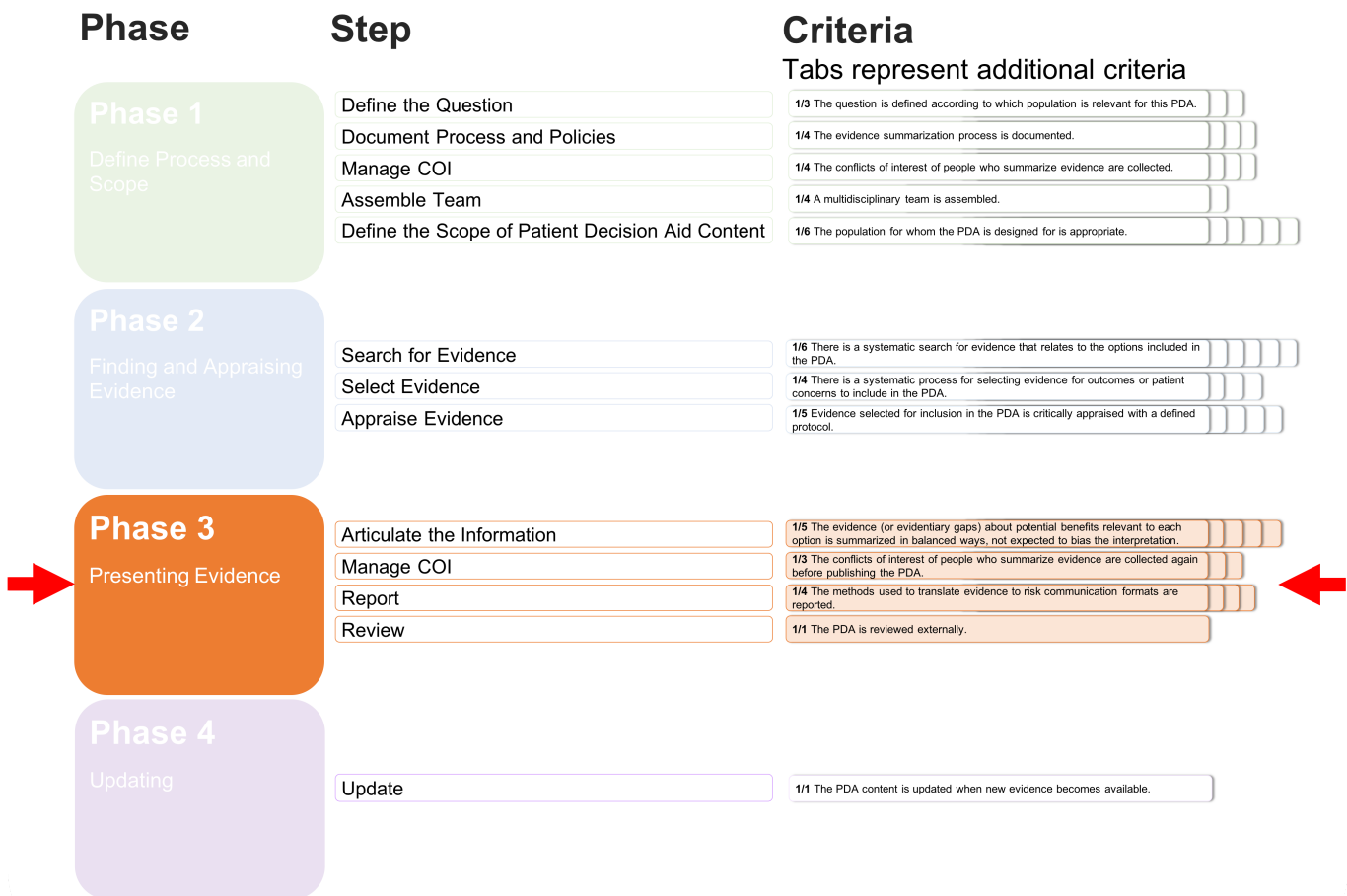
Do you have any comments or suggestions on the wording or order of any of the Criteria above? If so, please share them.

Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

PROPOSED PHASE 3 STEP 2

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 2: Manage COI**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Essential
The conflicts of interest of people who summarize evidence are collected again before publishing the PDA.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Any change to the conflicts of interest of people who summarize evidence are reported.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Actions are taken to manage relevant conflicts of interest.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

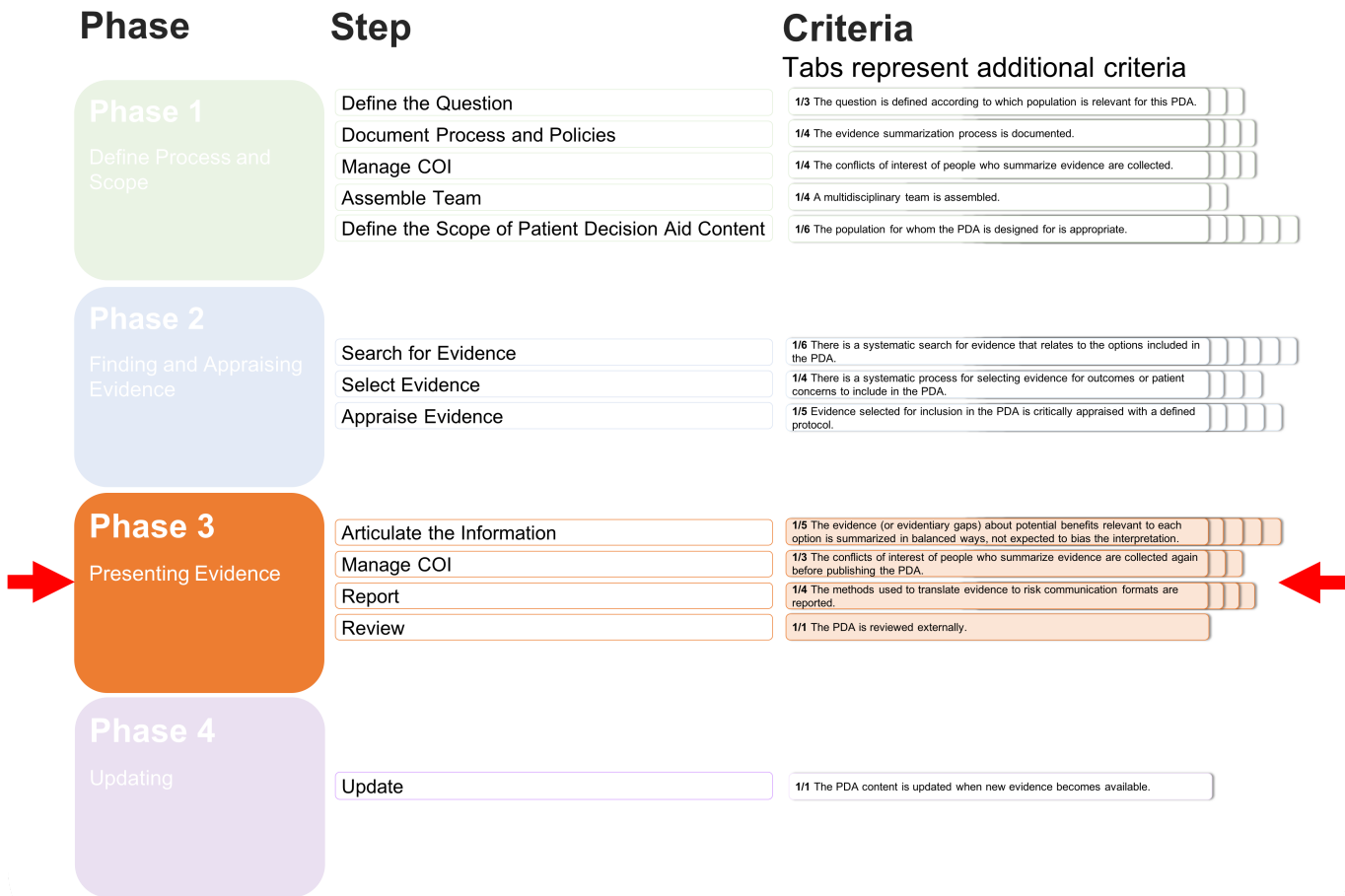
Do you have any comments or suggestions on the wording or order of any of the Criteria above? If so, please share them.

Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

PROPOSED PHASE 3 STEP 3

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 3: Report**

The proposed Criteria for this step are below. Please indicate whether each Criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible	Essential
The methods used to translate evidence to risk communication formats are reported.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The approach to readability of summarized evidence is reported.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The summarization process is reported publicly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The conflict of interest of people who summarize evidence are reported publicly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

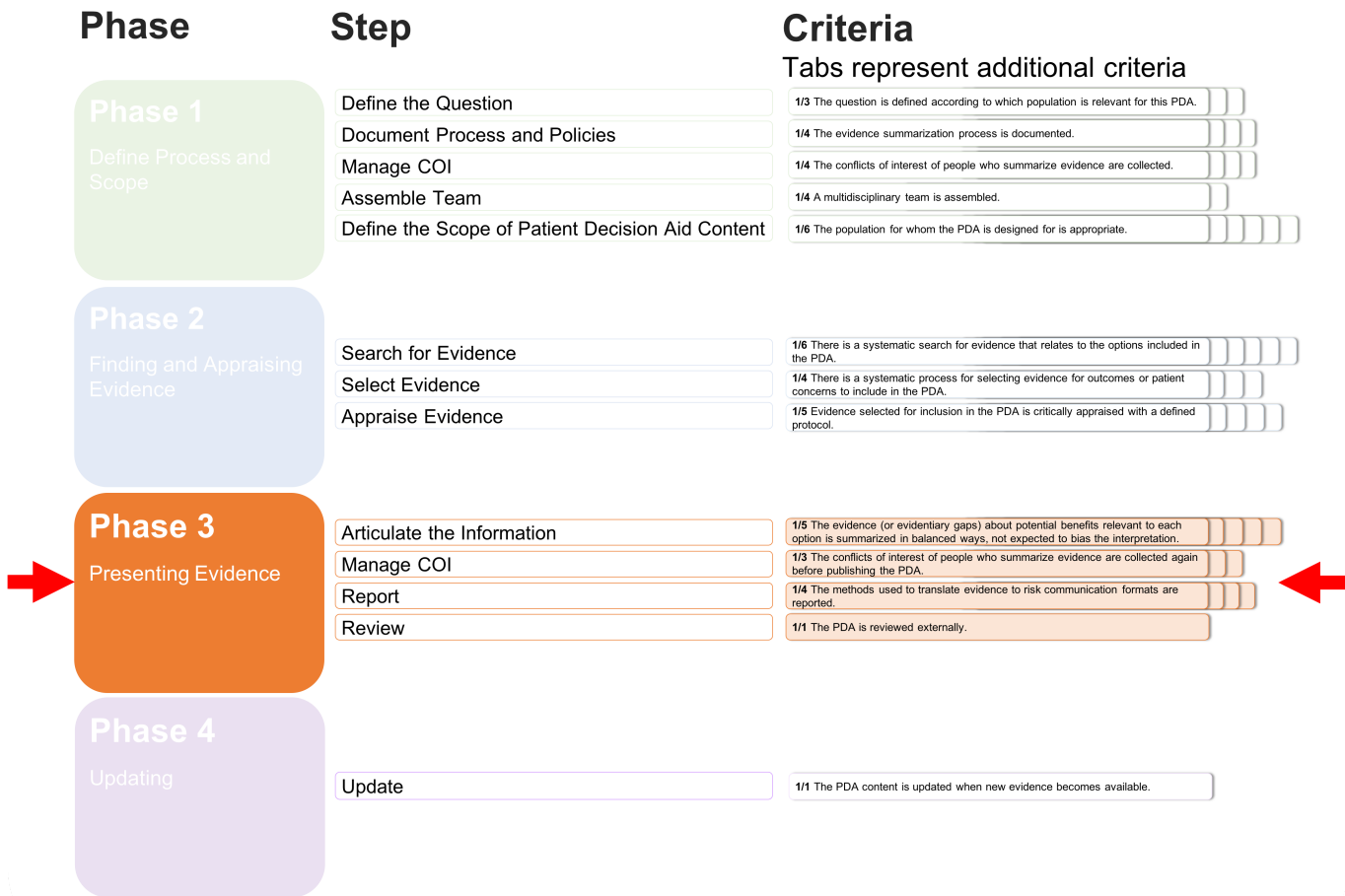
Do you have any comments or suggestions on the wording or order of any of the Criteria above? If so, please share them.

Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

PROPOSED PHASE 3 STEP 4

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 4: Review**

The proposed Criteria for this step are below. Please indicate whether each criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

Omit F

The PDA is reviewed externally.

Do you have any comments or suggestions on the wording or order of any of the Criteria above? If so, please share them.

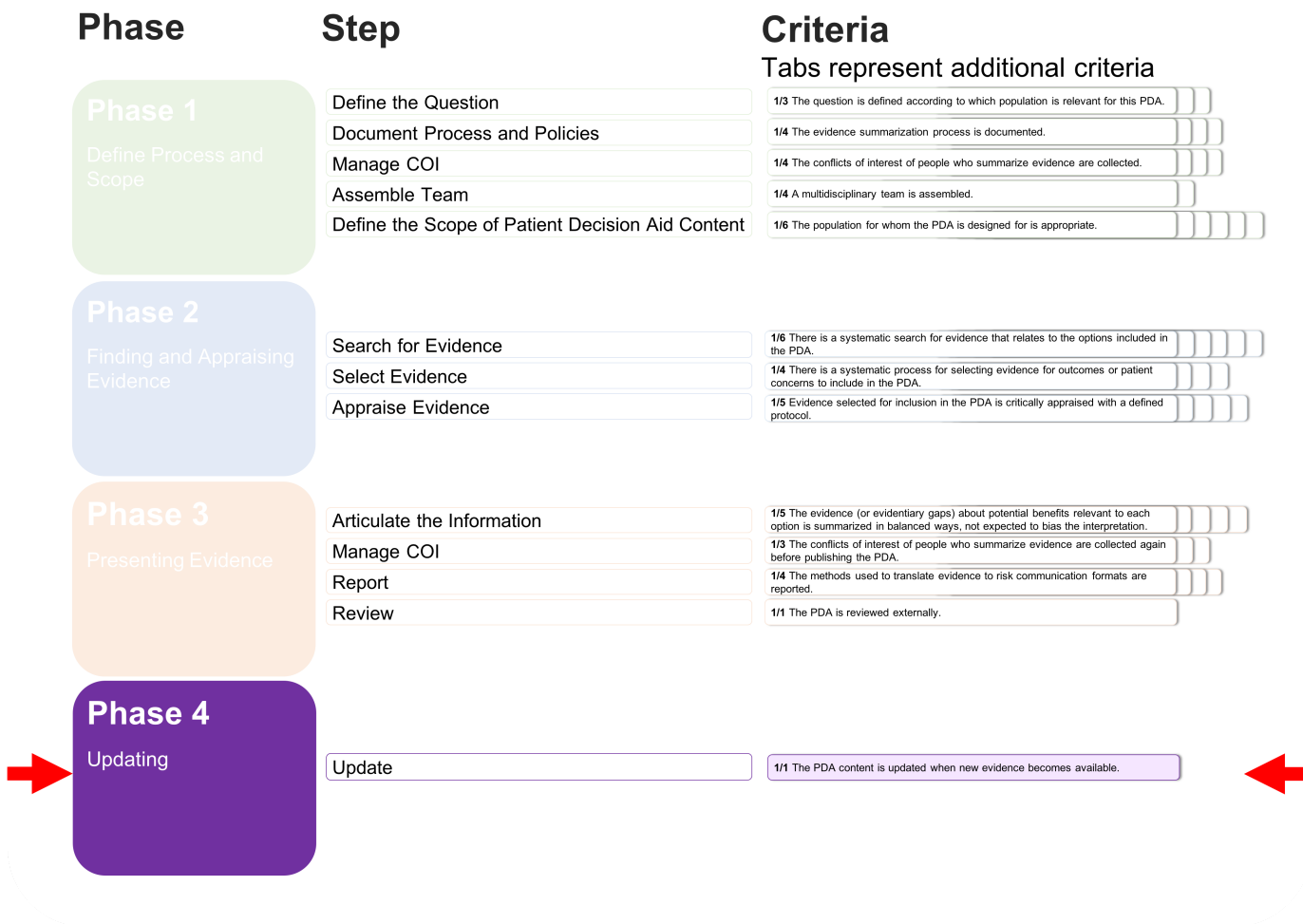
Do you have any suggestions for additional Criteria to include in this Step? If so, please share them.

Phase 4

PROPOSED PHASE 4

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Phase below? If so, please share them.

- **Phase 4: Updating**

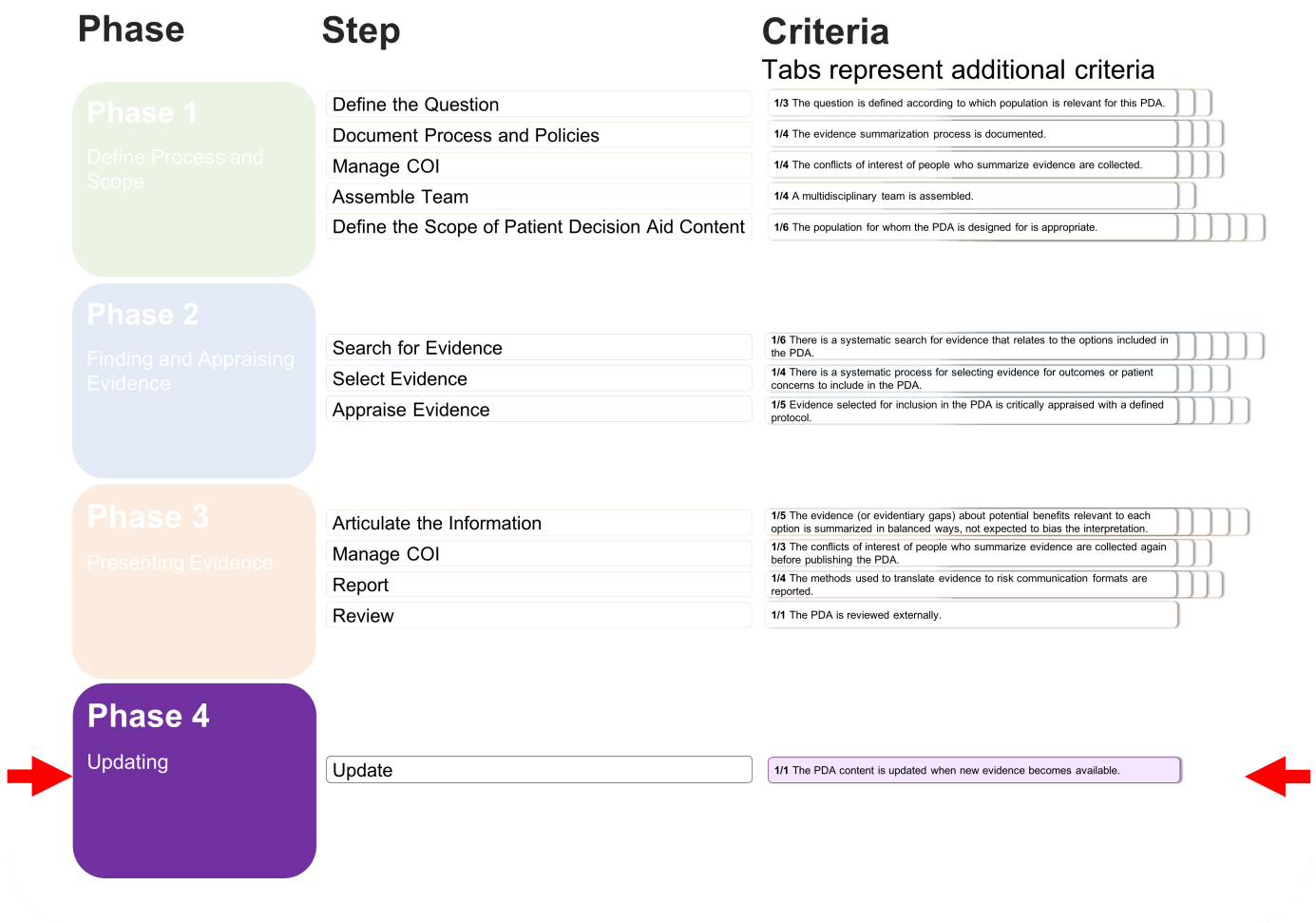
Do you have any comments or suggestions on the Step below. If so, please share them.

- **Step 1: Update**

PROPOSED PHASE 4 STEP 1

Proposed Phases, Steps and Criteria

For the Evidence Summarization of Patient Decision Aids



Feel free to [click here](#) to view a visualization of the proposed Phases, Steps and Criteria in a separate window while you complete the questions below.

Do you have any comments or suggestions on the Step below? If so, please share them.

- **Step 1: Update**

The proposed Criteria for this step are below. Please indicate whether each criterium should be omitted, or whether it is a possible candidate for inclusion, a desirable candidate for inclusion or is essential for inclusion.

	Omit	Possible I
The PDA content is updated when new evidence becomes available.	<input type="radio"/>	<input type="radio"/>

Do you have any comments or suggestions on the wording of the criterion above? If so, please share them.

Do you have any suggestions for additional criteria to include in this Step? If so, please share them.

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